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The Fifth Estate

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Broadcasting Dec 26

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58th Year 1988

Wall Street looks at the year ahead for the Fifth Estate

Getting into the act on high definition

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Broadcasting Dec 26

Vol. 115 No. 26

Chasing rainbows... NBC ups cable ante with half interest in Rainbow Program Enterprises. **PAGE 27.**

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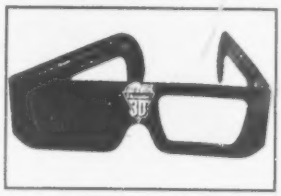

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1984 Cable Act but also modified final judgment issued by U.S. Judge Harold Greene in his supervision of breakup of AT&T are seen as barriers to such crossownership by seven Bell operating companies. NTIA has petitioned FCC to preempt Greene's regulation of BOC's, arguing that Greene is hampering BOC entry into information services, including cable.

Resolution now pending in House calls on Congress to wrest jurisdiction from Greene and eliminate barriers. Measure has backing of House Energy and Commerce Committee Chairman John Dingell (D-Mich.) and, at last count, 112 co-sponsors.

Duopoly one-to-a-market. FCC voted Oct. 27 to relax duopoly rules to allow closer spacing of commonly owned AM and FM stations, arguing that impact on diversity would be negligible and that it would allow some broadcasters to reap certain economies of scale.

Using same justification, FCC relaxed policy for waivers to one-to-market rules Dec. 12, saying it would look favorably on waiver requests involving top 25 markets with at least 30 broadcast voices.

Broadcast-newspaper. Appropriations bill (H.R. 4782), which was signed into law, includes provision that prevents FCC from reexamining its broadcast-newspaper crossownership rules.

Rupert Murdoch won victory in U.S. Court of Appeals in Washington March 29 when court ruled that statute passed by Congress in session's final hours violated First and Fifth Amendments by prohibiting FCC from extending current waivers of rule banning newspaper-television station crossownership. Court did not rule on constitutionality of substance of provision that bars commission from repealing or modifying television-newspaper crossownership ban.

Direct Broadcast Satellites

Number of applications to operate high-power Ku-band direct-to-home television service satellites has now outstripped available orbital assignments in separate DBS orbital arc, says FCC, which could assign new round of positions early next year. Comments were due Dec. 12 on FCC proposal to assign pairs of DBS slots—one east, one west, to create most efficient use of spectrum. Multiple applicants have requested one of four eastern slots only (from which whole nation can be served), leaving four western slots (reaching only western half of nation) underused. Replies to those comments are due Dec. 30.

GE Americom-HBO goal of beginning medium-power direct-to-home TV service may have been derailed by Nov. 8 FCC decision to deny request to modify K-3 power from 45 to 60 watts. Power boost was considered necessary to reach mass-marketable three-foot receiving dishes. GE-HBO venture, Crimson Satellite Associates, still hopes to bring cable programers to Ku-band delivery via already built K-3, scheduled for launch in January 1990.

"True" high-power Ku-band DBS delivery of TV programing directly to homes will become reality in U.S. in "1992 time frame," says Hughes Communications, whose plan to launch 200-watt DBS will go to parent General Motors for approval by end of year. Higher power—10 times higher than current fixed satellite service birds—says Hughes, will enable reception of video programing by affordable one-foot downlinks, thereby expanding current consumer home satellite market well beyond current two million.

Hughes says GE service would only be "interim" step toward its 200 watt service. Hughes and GE agree on need to bring together "business system," including programers and cable operators.

FCC extension granted last month gave Dominion Video Satellite and Hubbard Broadcasting's United States Satellite Broadcasting—among those granted permits with six-year expirations in December 1982—four more years—until Dec. 4, 1992.

High-Definition TV

■ Defense Department has announced that it will provide funding to organizations researching and developing new, low-cost methods of displaying and processing HDTV pictures. While Pentagon expects to use technology in defense applications, main goal is to insure that U.S. secures strong share of semiconductor and HDTV equipment industries.

National Telecommunications and Information Administration has asked for comments on whether U.S. government should continue to support worldwide adoption of 1,125/60 HDTV production. Inquiry asks whether any production format should be supported and, if so, what criteria should be used to decide which is superior. Comments are due March 1, 1989.

Deadline for "action memos" to Telecommunications Subcommittee has been postponed from Jan. 4, 1989, to Feb. 1. Subcommittee Chairman Ed Markey (D-Mass.) has asked Electronic Industries Association, American Electronics Association and Semiconductor Industry Association to submit reports recommending policies that would encourage U.S. activity in HDTV manufacturing. FCC's HDTV advisory task force and NTIA also were asked to prepare reports on subject.

Analysis subgroup of ATS committee's systems subcommittee has received submissions for 15 proposed HDTV or EDTV transmission systems. Thirteen of 15 systems were studied in-depth by analysis group during meeting held Nov. 14-18 in Washington. Report based on finding of week-long meeting will be submitted to systems subcommittee in February.

On Sept. 1, FCC tentatively decided to elim-

BY THE NUMBERS

Summary of broadcasting and cable

BROADCASTING

SERVICE	ON AIR	CP's [1]	TOTAL *
Commercial AM	4,929	288	5,197
Commercial FM	4,141	639	4,780
Educational FM	1,369	260	1,629
■ Total Radio	10,439	1,187	11,626
FM translators	1,650	428	2,078
Commercial VHF TV	545	21	566
Commercial UHF TV	508	228	736
Educational VHF TV	119	7	126
Educational UHF TV	216	31	247
■ Total TV	1,388	287	1,675
VHF LPTV	126	163	289
UHF LPTV	329	1,196	1,525
■ Total LPTV	455	1,359	1,814
VHF translators	2,722	102	2,829
UHF translators	2,110	356	2,456

CABLE†

Total subscribers	48,637,000
Homes passed	73,900,000
Total systems	8,000
Household penetration†	53.8%
Pay cable penetration	32%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 90.4 million. [1] Construction permit.

1,820 incidences of dropping broadcast signals or denying them carriage after court action.

And National Association of Broadcasters' survey found, of 259 television stations responding, around 50 stations are not being carried on at least one cable system that would have had to carry stations under must-carry rules.

Network Rules

FCC's network rules are being reviewed, and several may be modified or eliminated in upcoming year on ground that networks now face stiff competition, particularly from cable. FCC has opened proceedings looking at rules prohibiting networks from representing affiliates in spot advertising market, barring networks from owning cable systems and limiting network-affiliate contracts to two years.

Proposal to eliminate network-cable cross-ownership ban has proved highly controversial. In comments, cable industry joined networks in calling for repeal of ban, but network affiliates and advertisers argued for preservation of ban. Latter group felt allowing networks to own cable systems would give them undue market power. Proposal to repeal so-called two-year rule is not controversial. In FCC comments, networks were joined by station groups in support of proposal.

Public Broadcasting

■ NPR board will appoint working group early next year to design and present strategic plan for 1990's by next November. 10-member group will comprise mainly "citizen leaders" offering "perspective" from outside NPR membership. FY 1989, which began Oct. 1, is first year of "unbundled" programing, under which members may now choose to purchase only news or only cultural programing. Board will propose FY 1990 budget in February, likely representing 20%-25% member dues increases, to finance current service improvements and launch of new services.

PBS plans to suggest in early 1989 specific series for same-night prime time carriage next fall, hoping to assure uniform prime time schedule via at least one station in each major market. National Association of Public Television Stations is also coordinating national programing task force to streamline aggregation of station money.

President Reagan signed CPB reauthorization for 1991-1993 Nov. 7, after Congress agreed to cut annual authorizations to $245 million, $265 million and $285 million over three years, down from original congressional proposals of $304 million, $345 million and $404 million. Satellite replacement funding of $200 million over three-year period was retained. Bill creates TV program fund specifically for independent productions, move opposed by noncommercial stations.

Although President Reagan signed 1991 appropriation of $242,060,000 to CPB, with additional $56,810,000 for satellite, Office of Management and Budget is expected to recommend 1992 freeze at that level and not to appropriate satellite money.

Syndex

FCC now has before it stack of petitions to reconsider, in whole or in part, new syndicated exclusivity rules it adopted at May 18 meeting. Rules empower broadcasters to enforce exclusivity of programs against cable systems that import duplicative programing on distant broadcast signals. Broadcasters, led by National Association of Broadcasters and Association of Independent Television Stations, still strongly support rules, but they asked for refinements that would make it easier for broadcasters to enforce exclusivity. Cable interests, on other hand, still strongly oppose rules.

United Video, common carrier for superstations WGN-TV Chicago, WWOR-TV New York and KTVT-TV Dallas, and Century Communications have already notified U.S. Court of Appeals of their intention to challenge rules in court.

TV Stereo

Approximately 500 stations, over one-third of those now on air in U.S., are equipped to transmit stereo audio, including 59 ABC affiliates, 65 CBS affiliates, 146 NBC affiliates and 81 noncommercial stations.

Wireless Cable

Wireless cable is up and running in several markets and may be in several more within next year to complement and challenge cable operators.

Microband Companies Inc., New York, is industry leader, with systems in Washington, Detroit and New York. Metropolitan Cablevision has 25,000 subscribers in Cleveland, and claims to be holding its own in head-to-head competition with Viacom-managed North Coast Cable, conventional cable system operator. People's Choice TV has targeted Sacramento, Calif.

Wireless cable's principal problem remains inability to secure right to cable programing at what operators feel are equitable rates. Wireless pioneers charge that programers' recalcitrance is due to pressure from conventional operators, the programers' principal customers and, in some cases, their owners. Programers say any discrimination against wireless cable is result of concern about financial stability of operators and signal security.

To keep cable programing flowing to wireless, WCA plans to keep heat on cable industry in Washington with charges of anticompetitive behavior. WCA has three champions on Capitol Hill: Senators Howard Metzenbaum (D-Ohio), Albert Gore (D-Tenn.) and Larry Pressler (R-S.D.).

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music and sought to emphasize its new theme: family programing.

Two thirds of the prime time lineup was scuttled—*Crazy Like a Fox*, *Hardcastle and McCormick* and an in-house programing hour were dropped—and the *700 Club* was moved from 9 p.m. to 10 p.m. CBN bought *Bonanza* (120 episodes) and *Our House* (46 episodes) to run from 6 to 8 p.m. ET. A family movie was scheduled at 8, followed by the *700 Club* and *Remington Steele* at 11 p.m. *Remington Steele* is now carried only once. "Once a day was enough," said Krimsier of the show, which has "a late-night sophistication to it."

The new lineup is paying off with prime time ratings of over a 1. *Bonanza: The Lost Episodes* has averaged a 2 rating for its daily run at 6 p.m., scoring its best ratings on the weekend. *Our House*, running every night but Saturday at 7 p.m., has averaged a 1.7 since its debut in October. The movie slot has scored a 1.3, and *Remington Steele* averaged a 1 in October, improving its lead-in, the *700 Club*, which Krimsier said is averaging a 0.8. Over all, CBN said its prime time figures, from 7 p.m. to midnight, are up from a 0.8 in September and October 1987 to a 1.3 for September-October this year.

CBN researchers in New York say one-tenth of a rating point equals 43,600 homes, or $200 per 30-second spot in prime time. CBN made up for the earlier ratings shortfalls with makegoods, and Krimsier said that the new schedule is "meeting or exceeding our projections" on advertising.

Krimsier said that *Bonanza* fit in with the service's western lineup on Saturday and "also played into the family image," as did *Our House*. Those two shows "improved their time periods terrifically," he said.

Of more importance, said Krimsier, is the chance to promote other CBN shows in the movie segment during prime time. "We have a better chance of circulating people through" with a movie, he said. With a series, especially in the crucial prime time hours, if viewers tune in and don't like it, they may never return, he said. With a different movie each night, they are more likely to sample periodically and see promos of other CBN shows.

Among them are promotions for the network's original fare. Its new episodes of *Rin Tin Tin K-9 Cop* averaged a 4.5 rating, carried Saturday at 7 p.m., in its first six weeks. *Crossbow*, in its second season, seen on Saturdays at 7:30 p.m., averaged a 1.4 in October. CBN will debut *Border Town*, an adventure about a town on the U.S.-Canadian border, on Saturday, Jan. 7, 1989, at 6 p.m.

Still in need of help is CBN's daytime schedule. "We want to start paying attention to daytime," said Krimsier, especially the 12:30-4 p.m. block, where the fare is primarily half-hour, older sitcoms.

Although the *700 Club*, seen live in the morning and repeated at 10 p.m., is the lowest rated of the prime time programing and remains evangelical rather than entertainment in approach, Krimsier said there are no thoughts to shift it out of prime time. □

Week 13 posts 40.3 combined rating, 36.4 million households

'Twas the ratings week before Christmas (ended Dec. 18) and... NBC took the prime time week with a 15.4 rating and a 25.2 share. CBS pulled into second place—for the first time this season—with a 13.1/21.4, while ABC closed out the week with an 11.8/19.4.

In the evening news race, ABC's *World News Tonight* won the week with an 11.0/20. NBC came in second with a 10.9/20, followed by CBS's 10.7/19.

NBC's *Cosby Show* pulled back into first place, posting a 25.9/42. The *CBS Sunday Movie, A Very Brady Christmas*, claimed the number two spot with a 25.1/39. The movie ran opposite ABC's offering, a repeat of *A Smoky Mountain Christmas* which pulled in an 8.9/14 to rank 65th for the week. NBC's Sunday Movie, *She Was Marked for Murder* garnered a 14.8/24 and ranked 27th. (*Marked* began at 9:33 p.m. and was preceded by the 30-minute *Day By Day*, which had an 11.8/18 and ranked 47th.)

Boosted by the ratings numbers for *60 Minutes*, 19.3/32, and *Murder, She Wrote*, 19.9/31, CBS won Sunday night with a 22.4/35.3 over NBC's 12.2/19.3 and ABC's 8.7/13.7.

Monday went to NBC's 17.7/27.3, over ABC's 15.6/24.6 and CBS's 12.4/19.1. NBC's Monday movie, *I'll Be Home for Christmas* had a 17.9/28, while ABC's *Monday Night Football* (Cleveland vs. Miami) pulled in a 17.0/29.

Tuesday was won by ABC, which posted an 18.2/29.1 for the night. CBS's Tuesday movie, the *Hallmark Hall of Fame* presentation of *The Promise* pulled in a 10.4/17 to rank 56th for the week.

Wednesday went to NBC. The network posted a 13.9/20.1 for the night, while ABC had a 12.0/20.1 and CBS an 11.6/19.4. NBC's *Night Court* had a 16.7/26.

NBC took Thursday with a 22.2/35.7 over CBS's 11.9/18.7 and ABC's 7.5/12.0.

Friday night was a squeaker for ABC. The network pulled in a 12.9/22.8 for the night, just ahead of CBS's 12.8/22.4. NBC mustered up a 10.5/18.6 evening average.

Saturday went to NBC's 16.1/28.8, over ABC's 8.4/14.9 and CBS's 8.2/14.8.

In the Arbitron metered-market ratings, NBC's *Cosby Show* took first place for the week in seven of the 14 markets—New York, L.A., Miami, Washington, San Francisco, Atlanta and Denver.

Nielsen		Net
1.	25.9/42	N Cosby Show
2.	25.1/39	C CBS Sunday Movie
3.	24.2/39	N Different World
4.	23.7/37	N Cheers
5.	22.9/35	A Roseanne
6.	21.3/33	A Who's the Boss?
7.	20.1/35	N Golden Girls
8.	20.0/33	N L.A. Law
9.	19.9/31	C Murder She Wrote
10.	19.3/32	C 60 Minutes
11.	19.3/30	N Dear John
12.	18.8/30	N Unsolved Mysteries
13.	18.6/28	N ALF
14.	18.0/32	N Empty Nest
15.	17.9/28	N NBC Monday Movie
16.	17.5/27	A Moonlighting
17.	17.5/27	N Matlock
18.	17.0/29	A Monday Night Football
19.	16.8/26	N In the Heat of the Night
20.	16.7/28	C Knots Landing
21.	16.7/26	N Night Court
22.	16.1/24	N Hogan Family
23.	15.5/23	C Designing Women
24.	15.5/29	N Hunter
25.	15.1/26	A thirtysomething
26.	14.8/25	C Dallas
27.	14.8/24	N NBC Sunday Movie
28.	14.1/21	C Murphy Brown
29.	14.0/24	N Amen
30.	13.9/23	A Hooperman
31.	13.9/25	A 20/20
32.	13.6/25	C Wiseguy
33.	13.5/23	N Midnight Caller
34.	13.4/24	N 227
35.	13.2/23	A Full House
36.	13.0/20	N Family Ties
37.	12.9/20	A Wonder Years
38.	12.8/23	A Perfect Strangers
39.	12.7/19	C Kate and Allie
40.	12.6/21	C Charlie Brown's Christmas
41.	12.3/19	C Newhart
42.	12.2/22	A China Beach
43.	12.1/22	N Miami Vice
44.	12.0/21	A Mr. Belvedere
45.	11.9/21	C Falcon Crest
46.	11.8/21	C Beauty and the Beast
47.	11.8/18	N Day By Day
48.	11.7/19	A MacGyver
49.	11.5/20	A Just the Ten of Us
50.	11.2/18	N Baby Boom
51.	10.8/17	C Equalizer
52.	10.7/17	A Dynasty
53.	10.7/19	C Bugs Bunny Christmas
54.	10.6/18	N Chipmunk Christmas
55.	10.5/18	C Night Before Christmas
56.	10.4/17	C CBS Tuesday Movie
57.	10.3/17	A Free to Be a Family
58.	10.0/16	C Almost Grown
59.	10.0/18	N Season to Be Smurfy
60.	9.9/15	C Paradise
61.	9.4/17	A ABC Saturday Movie
62.	9.2/14	F America's Most Wanted
63.	9.2/16	N Sonny Spoon
64.	9.0/14	C 48 Hours
65.	8.9/14	A ABC Sunday Movie
66.	8.9/16	N Tattinger's
67.	8.8/14	N Magical World of Disney
68.	8.7/13	A Mission: Impossible
69.	8.6/13	F Married...With Children
70.	8.2/14	A Moscow Circus
71.	7.9/13	C Annie McGuire
72.	7.5/13	F 21 Jump Street
73.	7.2/14	C West 57th
74.	6.8/12	C Simon and Simon
75.	6.6/10	C TV 101
76.	6.5/11	A Murphy's Law
77.	6.4/10	A Knightwatch
78.	5.5/9	A Burning Questions
79.	4.8/7	F Garry Shandling Show
80.	4.2/6	F Tracey Ullman Show

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